

USDA Weekly Retail Turkey Feature Activity

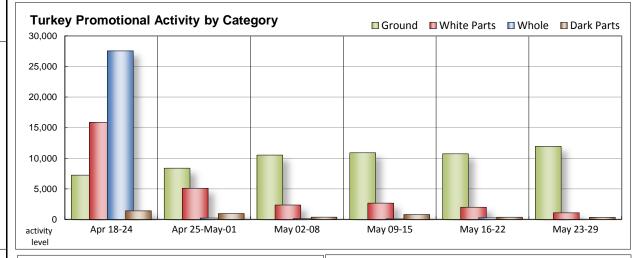
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 05/23 thru 05/29.

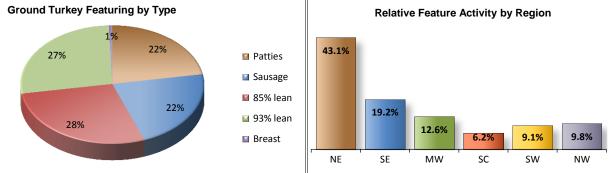
(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

(pri	ices in do	ollars per p	oound fre	esh unless	otherwi	se noted	
	NAT	IONAL S	UMMA	RY			
	THIS	WEEK	LAST	WEEK	LAST YEAR		
Feature Rate 1/		of 22,900 tlets		of 22,900 tlets	35.7% of 23,200 outlets 0.8%		
Special Rate 4/	3.	.4%	0.	.4%			
Activity Index 2/		,160	15	,000	13	,920	
3/	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg	
WHOLE BIRDS:							
Fresh - Hens							
" - Toms							
Frozen - Hens			50		40		
" - Toms			220	1.38	40	0.99	
PARTS:							
Breast:							
Bone-in, whole							
Fresh			10	_	30	_	
Frozen	280	1.69	680	1.69	200	1.73	
Split, bone-in							
Fresh			50		20		
Rotisserie	140	8.99	90	5.60	10		
Boneless, whole					30	3.99	
Cutlets	30	4.99	300	4.73	140	5.20	
Cutlets, thin sliced			140	4.99			
Strips							
Tenders	50	4.79	100	4.65	60	4.74	
Marinated Tenders	590	4.38	640	4.25	500	4.59	
Drumsticks	150	2.00	220	1.82	70	1.82	
Thighs	20	2.29	30	2.56	50	2.29	
Wings	130	1.96	50	2.02	30	1.74	
Necks	50	1.63	10	1.69	10	1.29	
Smoked Drumsticks	10	2.19	10	1.99	50	1.73	
Smoked Wings			60	2.39	90	1.97	
Smoked Necks					20	1.70	
GROUND TURKEY:	11,950	3.06	10,730	3.44	11,930	3.19	
Patties	2,670	3.31	1,070	3.56	1,670	3.39	
Sausage	2,630	3.19	1,300	3.35	2,690	3.41	
85% lean	3,350	2.64	2,240	2.77	2,400	2.72	
93% lean	3,230	3.19	5,110	3.57	4,720	3.13	
Breast	70	3.84	1,010	4.42	450	5.01	
Rolls (frsh/frz 1 lb.)	80	2.57	1,020	2.65	50	1.86	
Specialty ^{5/}							
Patties	200	4.14	130	3.99	360	4.03	
93-94% lean	480	3.94	430	3.99	170	4.29	
Breast			30		20		
Note: rolls & specialty no	ot included	d in ground	turkey tot	al and weig	hted avera	age.	

This Week's Turkey Feature Highlights

This week, feature activity decreases as retailers' center their attention on other proteins more commonly associated with Memorial Day holiday and the unofficial start of summer. Offerings of whole birds become non-existent. Bone-in breasts are viewed less often. When found, price levels are steady. White part offers decline although pricing higher. Dark parts are less frequently seen; prices are mixed. Looking for an opportunity to fire up the grill this weekend, ground turkey offerings increase and are at lower values. The most viewed grinds this week are 85% lean and 93% lean. Patties and sausage follow closely behind, while ground breast meat is nearly invisible. Deli turkey promotional activity declines this week, due to less self-service deli promotions. Service deli offerings focus on processor label thick slicing meats at slightly lower values and private brand thin slicing meats at higher price levels. This week, you will pay more for both processor and private self-service deli items.





All report information gathered from publicly available sources including store circulars, newspaper ads, and retailer websites.

1/ Feature Rate: the amount of sampled stores advertising <u>any</u> reported turkey item during the current week, expressed as a percentage of the total sample. 2/ Activity Index: a measure of the absolute frequency of feature activity equal to the total number of stores for each advertised turkey item (e.g., a retailer with 100 outlets featuring 3 turkey items has an activity index of 300). 3/ Stores/Avg: the total number of advertising outlets and the weighted average price weighted by the respective number of outlets. 4/ Special Rate: the percentage of sampled stores with a no-price promotion (e.g., buy 1, get 1 free, etc.) 5/ Specialty: products produced from birds raised on an all vegetable diet without antibiotics and minimally processed.



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	NORTI	HEAST U.S.		SOUTHEAST U.S. (AL,FL,GA,MS,NC,SC,TN,VA,WV) 46.4% of 5,900 sampled outlets 3.8% of stores w/ no-price promotions Activity Index = 3,910				MIDWEST U.S. (IA,IL,IN,KY,MI,MN,ND,NE,OH,SD,WI) 27.3% of 4,200 sampled outlets 4.3% of stores w/ no-price promotions Activity Index = 1,700			
	(CT,DE,MA,MD,M	E,NH,NJ,NY,PA,F	RI,VT)								
Special Rate ^{4/} Activity Index ^{2/}	1.6% of stores w Activity	Index = 6,420	tions								
	Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)		Summary Stores Wtd Avg		Price Range (\$/pound)	Summ Stores	Summary Stores Wtd Avg	
WHOLE BIRDS: Fresh - Hens " - Toms Frozen - Hens											
" - Toms PARTS: Breast: Bone-in, whole Fresh Frozen Split, bone-in								1.39 - 1.89	220	1.74	
Fresh Rotisserie Boneless, whole Cutlets Cutlets, thin sliced	8.99	10	8.99								
Strips Tenders	3.99	10	3.99								
Marinated Tenders	4.26 - 4.99	510	4.36	4.2	6	60	4.26	5.33	20	5.33	
Drumsticks	2.29	20	2.29					1.49 - 1.99	130	1.96	
Thighs Wings Necks	2.29	20	2.29					1.49 - 1.99 1.79	130 10	1.96 1.79	
Smoked Drumsticks Smoked Wings Smoked Necks				2.19	9	10	2.19				
GROUND TURKEY:											
Patties	2.99 - 4.49	1,500	3.55	2.50 - 3.79		900	2.83	2.99 - 3.99	70	3.62	
Sausage	2.39 - 3.99	1,400	3.24	2.50 - 3.99		710	2.94	2.80 - 3.74	310	3.32	
85% lean	2.29 - 3.49	1,410	2.82	2.39 - 3.33		1,620	2.54	2.00 - 2.55	70	2.03	
93% lean Breast (99-100% lean)	2.69 - 3.85 3.84	840 70	3.16 3.84	2.68 - 3.99	9	610	3.03	2.91 - 3.99	690	3.36	
Rolls (frsh/frz 1 lb.)											
Specialty ^{5/}	0.00 5.40	470	4.00					0.50		2.22	
Patties 93-94% lean	3.99 - 5.49 3.99 - 4.99	170 460	4.23 4.01					3.50 - 3.99 2.25	30 20	3.66 2.25	



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	SOUTH	CENTRAL U.S.		SOUT	HWEST U.S.	NORTHWEST U.S.				
	(AR,AZ,CO,KS,	,LA,MO,NM,OK,TX	,UT)	(0	CA,HI,NV)		(AK,ID,MT,OR,WA,WY) 29.0% of 1,200 sampled outlets 12.5% of stores w/ no-price promotions Activity Index = 400			
Feature Rate ^{1/} Special Rate ^{4/} Activity Index ^{2/}	3.3% of stores v	000 sampled outlet w/ no-price promo ty Index = 840	tions	0.0% of stores v	800 sampled outle w/ no-price promo ty Index = 890	tions				
	Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg		
WHOLE BIRDS: Fresh - Hens " - Toms Frozen - Hens " - Toms										
PARTS: Breast: Bone-in, whole Fresh Frozen Split, bone-in	0.97 - 1.79	40	1.50				1.59	20	1.59	
Fresh Rotisserie Boneless, whole Cutlets				8.99 4.99	130 30	8.99 4.99				
Cutlets, thin sliced Strips Tenders Marinated Tenders	4.99	40	4.99							
Drumsticks Thighs Wings Necks Smoked Drumsticks Smoked Wings Smoked Necks	1.59	40	1.59							
GROUND TURKEY: Patties Sausage 85% lean 93% lean	2.50 - 3.50 2.50 2.33 - 2.80 2.49 - 3.20	70 50 70 480	2.68 2.50 2.52 3.06	3.99 4.99 2.33 - 3.19 3.19 - 4.23	110 20 180 420	3.99 4.99 2.40 3.30	3.99 3.27 - 3.68 2.91 - 3.59	20 140 190	3.99 3.60 3.41	
Breast (99-100% lean) Rolls (frsh/frz 1 lb.) Specialty ^{5/} Patties 93-94% lean Breast	2.08 - 2.99	50	2.61				2.50	30	2.50	



USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats

Fri. May 23, 2014

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 05/23 thru 05/29.

(prices in dollars per pound unless otherwise noted; does not reflect all poultry items available in the marketplace)

	N	ATIONAL	SUMMAF	RY			NORTHEAST U.S.		SOUTHE	SOUTHEAST U.S.		
	This	Week	Last	Week	Last	Year	(CT,DE,MA,MD,ME,NH,NJ,NY,PA,RI,VT)		(AL,FL,GA,MS,N	(AL,FL,GA,MS,NC,SC,TN,VA,WV)		
	62.4% o	f 22,900	74.6% o	f 22,900	68.5% o	f 23,200						
Feature Rate 1/	sto	res	sto	res	sto	res	76.7% of 4,700 s	ampled outlets	52.3% of 5,900	sampled outle	ts	
A ativitus landaus O/	47	F.40		000	44	200	Activity Inde	ex = 14,130	Activity In	dex = 8,800		
Activity Index 2/	47,	540	52,	260	44,	300	Price Range	Summary	Price Range	Summary		
	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg	(\$/pound)	Stores Wtd Avg	(\$/pound)	Stores Wtd Avg		
SERVICE DELI - Turkey												
Category 1												
Processor Brand	6,830	7.84	4,460	7.85	5,320	8.25	6.97 - 12.99	2,720 8.03	6.99 - 9.99	2,290	7.61	
Private Brand	1,910	7.76	2,990	7.74	1,340	7.27	6.99 - 8.99	1,510 7.79				
Category 2												
Processor Brand	3,430	5.76	2,950	5.73	3,770	5.70		1,210 6.10	4.99 - 6.99	230	5.86	
Private Brand	6,620	7.16	3,090	6.79	4,460	7.01	5.98 - 8.99	2,310 6.98	6.49 - 8.99	1,210	6.58	
Category 3												
Processor Brand	740	3.94	1,680	4.19	,	4.05		330 4.06	2.99 - 4.38	80	3.39	
Private Brand	20	4.88	770	6.41	230	5.18	4.48 - 4.99	20 4.88				
Turkey Ham												
Processor Brand	270	3.45	380	3.94	270	3.64		100 3.40				
Private Brand					40	4.48	3					
Turkey Pastrami												
Processor Brand	230	3.62	450	4.22	150	4.24		180 3.64				
Private Brand					120	4.99	9					
SERVICE DELI - Chicken												
Category 1												
Processor Brand	2,630	7.42	3,440	7.26		7.27		630 6.44	5.69 - 8.49	970	8.02	
Private Brand	2,370	7.47	1,500	7.14	2,390	7.06	6.99 - 7.99	2,060 7.51	6.99	60	6.99	
Category 2												
Processor Brand	160	5.25	430	5.72	660	5.59			4.99	30	4.99	
Private Brand	360	5.99	160	6.08	170	5.99	9					
SELF-SERVICE DELI												
(dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	8,980	3.15	,	2.95	6,420	3.03		850 3.44	2.49 - 3.69	1,400	3.20	
Private Brand	810	3.06	2,750	2.58	3,080	3.41	2.50 - 3.50	370 3.01	2.50 - 3.99	40	2.74	
Turkey 16 oz												
Processor Brand	1,480	4.96	1,850	4.41	1,350	4.98		660 4.83	4.99	60	4.99	
Private Brand	1,080	4.50					4.99	10 4.99	4.50	1,070	4.50	
Chicken 7-10 oz	0.040	0.45	44.050	0.00	0.450	0.00		000 044	0.40	4.000		
Processor Brand	8,810	3.15	11,050	2.92	6,150	3.02		800 3.44	2.49 - 3.69	1,320	3.21	
Private Brand	810	3.06	2,610	2.57	3,080	3.41	2.50 - 3.50	370 3.01	2.50 - 3.99	40	2.74	

Category 1: composed of 1-3 whole breast lobes using no binders. (slicing)

Category 2: composed of multiple (5-7) whole or partial breast muscles; sectioned and formed with minimal binders. (thin slicing)

Category 3: composed of multiple muscle pieces chopped and reformed into desired shape. (shaving)





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	MIDW	EST U.S.	SOUTH CI	ENTRAL U.S.	SOUTHW	/EST U.S.	NORTHWEST U.S.			
	(IA,IL,IN,KY,MI,MI	N,ND,NE,OH,SD,WI)	(AR,AZ,CO,KS,LA	A,MO,NM,OK,TX,UT)	(CA,F	HI,NV)	(AK,ID,MT,OR,WA,WY)			
Feature Rate 1/	C4 00/ at 4 000	a summer de suitlete	CO 20/ of 4 200) a consider a contrate	FC 40/ - £ 0 000		69.8% of 1,200 sampled outlets			
		sampled outlets	· ·	sampled outlets	·	sampled outlets dex = 6,240				
Activity Index 2/	Price Range	Summary	Price Range	Summary	Price Range	Summary	Activity Index = 2,930 Price Range Summary			
	(\$/pound)	Stores Wtd Avg	(\$/pound)	Stores Wtd Avg	(\$/pound)	Stores Wtd Avg	(\$/pound)	Stores Wtd Avg		
SERVICE DELI - Turkey	(4/200110)	otoros maring	(φ/ροαα)	Ctores Triaring	(φ/ροαα)	Ctoroc Triaring	(4/2001.0)	Ciores Triaring		
Category 1										
Processor Brand	5.99 - 10.99	440 7.75	6.99 - 10.99	470 7.64	6.99 - 8.99	510 7.86	7.99 - 12.99	400 8.16		
Private Brand	6.99 - 8.99	380 7.69	6.49	20 6.49						
Category 2										
Processor Brand	4.99 - 6.98	1,190 5.81	4.99 - 5.99	430 5.13	4.99 - 5.49	340 5.01	5.98 - 6.99	30 6.71		
Private Brand	5.98 - 7.99	1,100 6.44	5.99 - 7.99	870 7.83	7.99 - 8.99	590 8.45	7.49 - 8.99	540 8.24		
Category 3										
Processor Brand	2.99 - 4.49	310 3.94	4.38 - 4.49	20 4.45						
Private Brand										
Turkey Ham										
Processor Brand	2.99	10 2.99	3.49 - 3.99	20 3.78	2.99 - 3.69	130 3.51	2.99	10 2.99		
Private Brand										
Turkey Pastrami										
Processor Brand	2.99 - 3.49	20 3.15			2.69 - 4.69	30 3.84				
Private Brand										
SERVICE DELI - Chicken										
Category 1										
Processor Brand	5.49 - 7.99	580 6.47	5.99 - 8.99	170 7.07	7.99 - 9.99	270 9.90	5.99	10 5.99		
Private Brand	5.99 - 10.99	230 7.27	7.99	20 7.99						
Category 2										
Processor Brand	4.49 - 4.99	80 4.88	5.99	50 5.99						
Private Brand	5.99	320 5.99	5.99	40 5.99						
SELF-SERVICE DELI										
(dollars per tub or pouch)										
Turkey 7-10 oz	4.00 0.50	4 000 0 04	4.00 0.00	0.450 0.04	0.40 0.00	0.440 0.00	0.40 0.50	000 004		
Processor Brand Private Brand	1.99 - 3.59 2.69 - 3.99	1,290 3.01 310 3.19	1.99 - 2.69 2.99 - 3.09	2,450 3.01 90 3.00	2.49 - 3.99	2,110 3.22	2.49 - 3.50	880 3.21		
Turkey 16 oz	2.09 - 3.99	310 3.19	2.88 - 3.08	30 3.00						
Processor Brand	4.99	290 4.99	3.99	120 3.99	4.99	170 4.99	5.99	180 5.99		
Private Brand	7.33	250 4.99	5.99	120 0.39	7.03	170 4.39	0.03	100 5.99		
Chicken 7-10 oz										
Processor Brand	1.99 - 3.59	1,270 3.02	1.99 - 2.69	2,450 3.01	2.49 - 3.99	2,090 3.22	2.49 - 3.50	880 3.21		
Private Brand	2.69 - 3.99	310 3.19	2.99	90 2.99				3.2		
1 mate Bland	2.00 0.00	0.0 0.10		20 2.00	ı	1	ı	1		

Category 1: composed of 1-3 whole breast lobes using no binders. (slicing)

Category 2: composed of multiple (5-7) whole or partial breast muscles; sectioned and formed with minimal binders. (thin slicing)

Category 3: composed of multiple muscle pieces chopped and reformed into desired shape. (shaving)